User Manual

worldVIEW Dashboard

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Chapter 1: Introduction

What is worldVIEW?

worldVIEW delivers visibility into the operating status and location of every asset, every remote worker and every vehicle in your fleet equipped with a Cartasite device. Our easy-to-use dashboard presents all your information in one consolidated place. Detailed reports and analytics are easy to access and understand, allowing you to make more informed decisions. A comprehensive reporting system allows creation of customized reports or choose from a broad library of standard reporting options. For customized reports...
Chapter 2: Getting Started

Logging into worldVIEW Dashboard

To log in and access your dashboard portal follow these steps:
2. Sign in with your username (company email) and your password which was sent via an email upon setup of your account.

- If you do not know your password, click the link “Forgot Your Password” to receive an email to reset, or contact Customer Care (877-516-9373; customercare@cartasite.com) if you have more questions about your account.
Using the Settings Dropdown

The settings dropdown allows a user to do the following:

- Adjust Time Zone
- Change Units of Measure (Imperial vs. Metric)
- Adjust Marker Clustering
  - What is Marker Clustering? This feature is in place to show a high number of devices in each area using a heat cluster.
- Show Drilling Info
- Change Password
- Access Support
Chapter 3: worldVIEW Map Details

Universal Search Box
The search box is a quick way to search for Driver, Device or Assets within the groups you have access to view.

To use the search bar, follow these steps:
1. Begin typing what you are looking for in the search box field. As you type, worldVIEW will begin displaying potential matches
2. Once found, scroll over asset and click to bring into view on the Map

Map View
The Map View provides the virtual map allowing you to monitor assets in your area.

The Map View consists of the following areas:

Tree Panel:
Where you may view your company hierarchical structure and select groups to be populated into the map and data grid.

Map Panel:
Integrated with google maps, the map panel shows you your drivers and assets as "dots on a map" and allows you to zoom in or out, switch between satellite or map views, or select a traffic overlay.

Data Grid:
Details the drivers or assets you have in your selected group. Serves as a window into trip details, exception events, and diagnostic information.
Map Tools
From the Map View, you may right-click anywhere on the map that is not an asset or geofence and use the following three tools:

**Fly To:** enter an address or Lat/Long to “fly to” that location on the map instantly

![Fly To tool](image1)

**Latitude & Longitude:** choose to obtain the Lat/Long at that exact location

![Latitude & Longitude tool](image2)

**Ruler:** draw the line which measures the direct distance between two points on the map

![Ruler tool](image3)
**Tree Panel**

The Account Tree controls what information will be shown on the other panels. Details can be viewed at the account or group level.

![Account Tree](image)

To use the Account Tree, follow these steps:
1. Click on the checkbox next the Account(s) or Group(s)
2. You may also hover over a group for a dropdown which will allow you to select or deselect all subgroups
3. Once you’ve made your selections, notice the devices associated will appear on the map panel as well as in the overview section

**Data Grid - Overview Tab**

The Overview Tab provides an overview of your selected groups.

To use this function, follow these steps:
1. Select your groups from the Tree Panel on the left-hand side. The groups you have selected on the tree will determine groups populated in the data grid.
2. You may expand or collapse your groups by clicking on the + or - symbols next to the group
3. From the data grid, you may select your desired view perspective the Person, Vehicle, or Device tabs (ROVR, globalTAG, SPOT, fieldTICKET, homeSAFE). *Note- choosing the "Person" tab will only display the most recent event for that person. This view is not the best for displaying the total picture of your devices. Viewing from the Device tab will give you a more complete picture.
Details Tab

The Details tab provides event details for a designated time period which includes including trip breadcrumbs or exception events. You can view details by Driver, Asset or Device.

To view details, use the following steps:

1. Click on the driver, device or vehicle name displayed under your groups, and view the pop-up window in the worldVIEW map
2. Select "Details" the button.
3. You may achieve the same results by right-clicking on the driver's name and selecting "Details."
4. From the details tab, you may view or export time based occurrences for the following metrics:

   a. Trips - information from ignition on to ignition off
   b. Stops - Ignition off locations
   c. Speeding - Speeding events
   d. Hard Brakes - Deceleration of 6mph/sec or greater
   e. Rapid Starts - Acceleration of 6mph/sec or greater
   f. Lateral Accelerations - Swerving of 6mph/sec or greater
   g. Idling - Event generated from a speed of 0mps for 3+ minutes
   h. Diagnostics - Unplug/Plug in events, Low Battery and DTC codes
   i. Satellite Locations - for ROVR Satellite Locator trip details

5. Once in the details tab, you may select a date range to display your trips. Click the calendar icon on the “From” and “To” fields, then click “Go”
6. You may also export trip details by selecting the 'Export' button and choosing "Summary" or "Detailed"

![Export Options](image)

**Details Tab - Breadcrumb Trail**

To view the details of any event (Trips, Stops, Hard Brakes, Idling, Lateral Acceleration, Rapid Starts, Speeding) you can click on the “+” icon next to the trip you wish to display to expand out the trip. This will display the data history of that trip and show the “Breadcrumbs” trail on the Map.

![Map View with Breadcrumb Trail](image)

You may click into specific breadcrumbs to view the event and exact location of all breadcrumb icons.
To EXPORT the trip information, set your timeframe and click "Export" - here you may export a detailed trip csv file, or a summary of the trip.

Chapter 4: Geofences

Geofence Types

The Geofence tab allows you to set up “virtual” boundaries around locations of interest. You can then use these to set up parameters in the Notification tab that will send out alerts if the parameters are breached. Geofences may be created at the top level of your tree and applied to all subgroups or created in specific groups only.

Drawing a Geofence

To create a Geofence, follow these steps:

1. Select the groups on the Account Tree to apply the geofence to
2. Select “Geofences” tab on the right-hand side
3. Select “New” and a content menu will display
4. Fill in Geofence detail, draw geofence and click “Add”
Edit/Delete a Geofence

To edit/delete a Geofence, follow these steps:
1. Select your groups on the tree panel
2. Select the "Geofences" tab on the right-hand side of the data grid
3. Expand the group that the Geofence has been created in
4. Select the pen or "x" icon to edit/delete Geofence

Managing Geofence Library

You can view all your geofences under the groups where they are built. You view and manage the following from the geofence tab:
- Active- toggle on or off
- Inheritable- view if geofence has been marked as inheritable to apply to all sub-groups in the tree
- Import- we can import bulk radius geofences. Ask Cartasite for details
Chapter 5: Safe House

What is Safe House?

Safe House allows supervisors to be notified when their employee has not returned to their home at the end of their shift. Enabling Safe House and Setting Shift Hours is done by a worldVIEW Administrator.

Set your Safe House Geofences

1. In worldVIEW Dashboard, select the Geofences tab on the right-hand side.
2. Click “New” next to the group you wish the Geofence to be applied to.
3. Complete your Geofence parameters. Make sure you select “Safe House” as the geofence type. Safe House geofences will always be white on the map.
4. If you wish to keep an employee’s home private, you may select a driver’s neighborhood for your geofence and achieve the same results.
Set your Safe House Notifications

1. In worldVIEW Dashboard, select the “Notifications” tab at the top

2. Click “New” under the group you wish to set your notifications for. Remember— you may set notifications at the top-most level you wish to be applied

3. Choose your parameters for your notifications and click “Ok”
Chapter 6: SafeConnect

What is SafeConnect?
SafeConnect is a feature available to Administrators and User roles in the worldVIEW Dashboard. (This feature is not available or Personal Users.)

The feature enables Dashboard users to call workers in the field without distracting them while driving. A Dashboard user initiates a call from the SafeConnect tab by clicking on the phone icon next to the person they want to call. Calls are queued for recipients until they are no longer driving, at which point a call is placed to the requestor before connecting them to the recipient. Prior to connecting, the requestor may cancel the currently queued call by clicking on the red cancel icon next to the recipient.

To set up SafeConnect, you will need to notify your company Program Administrator to confirm the following:

1. All drivers have a valid cell phone listed in the "mobile" field in their driver profile
2. All Users who wish to use SafeConnect need to also have a driver profile in worldVIEW with a valid phone number in the "mobile" field. If they do not have one, you may create one for them (no need to link a vehicle or device)
3. The User and Driver profiles should have the same company email

How to use SafeConnect
Follow these steps to place a call to a driver from worldVIEW Dashboard:

1. Make certain you have all groups you manage selected on the worldVIEW Tree
2. Locate the Safe Connect tab
3. Find the driver you wish to call and click the green phone icon. This means the driver has a valid cell phone listed in the "mobile" phone field in worldVIEW.

4. SafeConnect will ring on the Dashboard User's phone first, and upon answering, will determine if the call can be connected.
5. If the driver is "safe" (if they are not in a driving state) the call will be connected.
6. If the driver is in a driving state, the call will be placed in a queue for 60 minutes until they are no longer in a driving state.
7. When the driver reaches a "safe" state, the SafeConnect will call the Dashboard user first, followed by the driver.
8. To cancel a call, click the red cancel button at any time after making the call request.

**Please note**– the phone number which will appear to the driver when you use SafeConnect for the first time, will be a random number located out of Salt Lake, UT. 

Once the driver receives one of these calls for the first time, they should add this number to their contacts as the name of your company (or supervisor whom would be calling them). This will ensure you receive an answer and that the call is not ignored because it is unknown to the driver.
Chapter 7: Scorecards

What are Scorecards?
Scorecards provide a weekly snapshot of a driver's previous week of driving behavior. They are designed to give driver's all the information they need to self-correct driving behaviors in need of improvement and identify areas where they are the strongest & safest.

Scorecards are available for drivers (personal), supervisors (group) and superintendents or corporate-level (multi-group)

Scorecards are delivered via email to driver's email inbox every Monday from the address ROVR@Cartasite.com. If necessary, please advise all drivers and supervisors add this email to their Safe Sender list.

To setup scorecards, please contact Cartasite.

Historical Scorecards

To retrieve archived scorecards, follow these steps:
1. Navigate to the “Scorecards” tab
2. Fill in the Scorecard type and date range, then click “OK”
3. Select blue date link to open the scorecard under each drivers’ name
DRIVER SCORECARD

Jason Anderson

SUMMARY OF YOUR WEEK

- 90%
  - 161 miles
  - 05:57 hrs
  - #4 Group Ranking

TRENDING

<table>
<thead>
<tr>
<th>Your Score</th>
<th>Group Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>96</td>
</tr>
<tr>
<td>92</td>
<td>91</td>
</tr>
<tr>
<td>90</td>
<td>90</td>
</tr>
</tbody>
</table>

GROUP LEADERBOARD

1. Shop Truck 100.0 A-
2. Unregistered Driver 99.4 A-
3. Doug Lenz 92.0 A-
4. Your Score 90.6 A -1
5. Nathan Pruell 87.6 B+ -1

SPEEDING

- 89
  - Last Week 88
  - Good job!

ENGINE UTILIZATION

- 17 %
  - 01:15 hrs
  - 05:57 hrs

BRAKING

- 89
  - Last Week 96
  - Smooth braking this week

IDLING COST

- $13.07
  - $84.68
  - $1.90

ACCELERATION

- 93
  - Last Week 95
  - Smooth Acceleration this week

DRIVER INFORMATION

- Company: Cameron
- Group: Minot Office Staff
- Plug In: 0
Chapter 8: Reporting (Insights)

We have many reports built into worldVIEW that give you more insights into driver performance, fleet maintenance, efficiency, and geofence location data.

Follow these steps to run a report:

1. Navigate to the "Insights" tab
2. Choose your device type, report type and date range (if applicable), then click "Run"

You may run the following reports (some may not be available for all device solutions)

- Dashboard Device Status
- Driver Performance
- Fleet Mileage
- Fleet Fuel Cost
- Geofence Incident
- Idling Summary
- Machine Runtime
- Multi-Driver Utilization
- Recall Notification
- Low Battery
- And More!

How to Schedule Reports

Use this feature to get the data you need, as often as you need it, delivered directly to your email.

1. Click on the gear in the upper right hand corner. Then click Schedule.

2. If you want to give your schedule a name, add it in the name section. If not a name will be automatically generated for you.

3. It will automatically add your email to the list of recipients, but if you would like someone else to receive the report you can add their email as well.
4. Along with adding additional emails you can customize the message you want someone to receive. Click the checkbox to add a custom message to go along with your emailed report.

5. Select the type of file format you would like the report to be delivered as.

6. Setting up when you would like to receive the report each month, a few examples are shown below.
7. You can also configure your report to run in a specific time zone by check the time zone box in advanced options.

8. To verify that your schedule will send what you want, you can send a test.

How to Create Custom Filters

Date filters have already been added to each report, but if you would like to change the range on which data is being pulled from there are a few basic ways to help you accomplish this.

Standard filter for most reports looks like:

If you want data from the current month:
If it's October and you want data from September, there are a few ways to accomplish this.

### Data Range

<table>
<thead>
<tr>
<th>Date</th>
<th>Filter</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>is in the past</td>
<td></td>
<td>2018-09-01</td>
<td></td>
</tr>
<tr>
<td>complete months</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you want data from a specific date range. You can use a filter like this:

<table>
<thead>
<tr>
<th>Date</th>
<th>Filter</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>is in range</td>
<td></td>
<td>2018-09-01</td>
<td>2018-10-31</td>
</tr>
<tr>
<td>until (before)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you want data from the current quarter:

<table>
<thead>
<tr>
<th>Date</th>
<th>Filter</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>is in the past</td>
<td></td>
<td>1</td>
<td>quarters</td>
</tr>
<tr>
<td>complete quarters</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you want data from the previous quarter:

<table>
<thead>
<tr>
<th>Date</th>
<th>Filter</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>is in the past</td>
<td></td>
<td>1</td>
<td>complete quarters</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you want data from the current year:

<table>
<thead>
<tr>
<th>Date</th>
<th>Filter</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>is in the past</td>
<td></td>
<td>1</td>
<td>years</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Sorting

1. To sort a single column, click the column header. To reverse the sort, click it again.
2. To sort by multiple columns, hold the shift key while clicking additional column headers. Click a header twice to reverse the sort on additional columns.
Chapter 9: Notifications

Notifications are used to alert you to an event that is happening in near real-time.

You may create notifications for the following events:

- Arrive/Depart Events
- DTC Codes
- Failed to Register (For iButton Use)
- Geofence Enter/Exit Events
- Hard Braking
- Rapid Starts
- Severe Speeding
- Idling Which Exceeds a Custom Threshold
- Lateral Accelerations
- Low Battery
- Unplug/Plug In Events
- Safe House Alert

Create New Notification

Follow these steps to create a new notification:
1. Navigate to the “Notifications” tab
2. Select “New” next to the group you wish to create a notification for
3. Set your notification parameters, then click OK
Managing Notifications

From the Notification tab, you may view all notifications which you have setup under your User account.

You may quickly determine all details about the notifications and edit or delete a notification.

***Tip: Notifications will only appear in the profile of the user that created them (even if they are applied to all drivers or groups). You want to make sure your company has a policy in place for whom is setting up notification so they are not accidently duplicated.

Event Stream

If you select a notification to populate into your "Event Stream", you may access that feed via the Event Stream tab in the worldVIEW Dashboard. This is located next to your Tree Tab.
# worldVIEW Icon Glossary

<table>
<thead>
<tr>
<th>Icon Name</th>
<th>Icon Image</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acceleration Event</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when acceleration value for a movement event is &gt; 5.4mph/s</td>
</tr>
<tr>
<td>Arrive Event</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when device reports an arrive event.</td>
</tr>
<tr>
<td>Hard Braking</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when acceleration value for a movement event is &lt; -5.4mph/s</td>
</tr>
<tr>
<td>Default location marker</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed on map to specify where assets are located.</td>
</tr>
<tr>
<td>Depart Event</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when a trip has started (vehicle has departed)</td>
</tr>
<tr>
<td>Idle</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when vehicle reports engine on and no movement for 2+ minutes.</td>
</tr>
<tr>
<td>Ignition Off</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when a device reports the vehicle engine is off.</td>
</tr>
<tr>
<td>Ignition On</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when a device reports the vehicle engine is turned on.</td>
</tr>
<tr>
<td>Movement</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when a device reports a movement event.</td>
</tr>
<tr>
<td>Plug In</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when a device is powered on, or plugged-in.</td>
</tr>
<tr>
<td>Speeding</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when a device’s speed is above speed limit.</td>
</tr>
<tr>
<td>Device Icon</td>
<td><img src="image" alt="Icon" /></td>
<td>Displayed when viewing worldVIEW dashboard under any of the devices tabs.</td>
</tr>
<tr>
<td>Icon Description</td>
<td>Displayed When</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------</td>
<td></td>
</tr>
<tr>
<td>Person Icon</td>
<td>Viewing worldVIEW dashboard under the ‘Person’ tab.</td>
<td></td>
</tr>
<tr>
<td>Vehicle Icon</td>
<td>Viewing worldVIEW dashboard under the ‘Vehicles’ tab.</td>
<td></td>
</tr>
<tr>
<td>Group Icon</td>
<td>Viewing groups in worldVIEW dashboard.</td>
<td></td>
</tr>
<tr>
<td>Asset Icon</td>
<td>Viewing worldVIEW dashboard when a user clicks on an asset name.</td>
<td></td>
</tr>
<tr>
<td>Trip in Progress</td>
<td>Datagrid if trip is in progress. (no arrive event received since last depart event)</td>
<td></td>
</tr>
<tr>
<td>Idling in Progress</td>
<td>Datagrid if idle is in progress.</td>
<td></td>
</tr>
<tr>
<td>Stop in Progress</td>
<td>Datagrid if stop is in progress. (no depart event received since last arrive event.)</td>
<td></td>
</tr>
<tr>
<td>DrillingInfo Well</td>
<td>Marks the location of a DrillingInfo well site if feature is enabled</td>
<td></td>
</tr>
<tr>
<td>SafeConnect Call available</td>
<td>Driver is setup to receive SafeConnect calls</td>
<td></td>
</tr>
<tr>
<td>SafeConnect End Call</td>
<td>Active call can be canceled.</td>
<td></td>
</tr>
</tbody>
</table>
Additional Resources

Visit our online training library for short how-to videos and additional reference materials at:

**Cartasite**
https://cartasite.com/training-center/
Password: safety

**StriveSafe**
https://strivesafe.com/customer-care/
Password: getsafe

You may also sign up for one of our live monthly training webinars through our training center. We cover basics of worldVIEW, driver scorecards, new products & feature releases, and more!

We offer trainings for:

- Supervisors
- Superintendents
- Managers
- Program Administrators
- Field Operators
- Fleet Managers
- HSE

Contact Our Cartasite Customer Care Department

**Customer Care Hours:**
Monday - Friday
7:00AM - 5:00 PM
(MST, UTC/GMT-7)
After Hours Answering Service

**Phone Support:**
1-877-516-9373 (Toll Free)
1-303-865-3140

**Email:**
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CustomerCare@Cartasite.com

Chat Live when Logged into worldVIEW Portal